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Voluntary - Public

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GAIN Report Number: HR9015

Croatia

Post: Zagreb

Market Brief

Report Categories:

Tree Nuts

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Report Highlights:

This report discusses the market for tree nuts in Croatia and Croatia's current requirements for the importation of tree nuts. Since Croatia is in the process of joining the European Union and its import requirements may change, please check with the USDA/FAS office in Zagreb for the latest regulations.

General Information:

Market Situation

Croatia imported 2,807 metric tons (MT) of tree nuts in 2009, valued at \$16.7 million, of which

\$4.5 million, mostly almonds, were from the United States. According to Croatian Central Bureau of Statistics, Croatia produced 6,828 MT of walnuts, 1,289 MT of hazelnuts, and 905 MT of almonds in 2008. Croatia's almond production satisfies about half of domestic demand, thus there is good market potential for U.S. almond producers and exporters.

Croatia: Imports and Exports of Tree Nuts

Croatia Import Statistics

UDG: Tree Nuts, Group 20 (2007)

Year To Date: January - December

Partner Country	United States Dollars			% Share			% Change 2008/2007
	2006	2007	2008	2006	2007	2008	
World Total	11,630,942	15,151,306	16,671,378	100.00	100.00	100.00	10.03
United States	2,594,925	3,844,539	4,515,018	22.31	25.37	27.08	17.44
Turkey	4,042,964	3,114,431	3,807,324	34.76	20.56	22.84	22.25
Italy	844,809	3,137,789	2,928,402	7.26	20.71	17.57	- 6.67
Romania	2,152,708	2,826,396	2,721,328	18.51	18.65	16.32	- 3.72
Iran	241,457	326,312	726,833	2.08	2.15	4.36	122.74
Hungary	737,904	770,807	234,003	6.34	5.09	1.40	- 69.64
India	83,768	173,060	205,257	0.72	1.14	1.23	18.60
Ukraine	6,180	0	161,456	0.05	0.00	0.97	0.00
Vietnam	10,082	42,390	143,493	0.09	0.28	0.86	238.51
Slovakia	187,951	158,518	134,454	1.62	1.05	0.81	- 15.18
Chile	119,598	1,950	112,436	1.03	0.01	0.67	5665.95
United Arab Emirates	0	0	111,484	0.00	0.00	0.67	0.00
The rest

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Croatia Import Statistics From World

Commodity: Tree Nuts, Group 20 (2007)

Year To Date: January - December

Commodity Description		United States Dollars		
		2006	2007	2008
Tree Nuts	Group 20 (2007)	11,630,942	15,151,306	16,671,378
080222	Hazelnuts Or Filberts, Fresh Or Dried, Shelled	4,764,125	5,804,132	5,970,129
080212	Almonds, Fresh Or Dried, Shelled	2,933,271	4,093,755	4,769,587
080232	Walnuts, Fresh Or Dried, Shelled	2,634,926	3,380,218	3,210,415
080250	Pistachios, Fresh Or Dried, Shelled Or Not	545,366	669,089	1,198,570
080240	Chestnuts, Frsh Or Dried, W/Nt Shelled Or Peeled	367,127	363,890	472,244

080132	Cashew Nuts, Fresh Or Dried, Shelled	143,012	244,889	440,026
080221	Hazelnuts Or Filberts, Fresh Or Dried, In Shell	7,200	233,465	200,766
080122	Brazil Nuts, Fresh Or Dried, Shelled	26,007	77,556	139,052
080290	Nuts Nesoi, Fresh Or Dried, Shelled Or Not	41,433	87,125	69,370
080111	Coconuts, Dessicated	98,541	113,596	63,954
080211	Almonds, Fresh Or Dried, In Shell	46,034	39,429	60,624
080231	Walnuts, Fresh Or Dried, In Shell	6,200	15,413	37,968
080119	Coconuts, Other Than Dessicated	17,700	26,467	27,574
080260		0	1,144	11,010
080131	Cashew Nuts, Fresh Or Dried, In Shell	0	1,138	89

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Croatia Export Statistics

UDG: Tree Nuts, Group 20 (2007)

Year To Date: January - December

Partner Country	United States Dollars			% Share			% Change 2008/2007
	2006	2007	2008	2006	2007	2008	
World	639,922	1,188,811	1,901,745	100.00	100.00	100.00	59.97
Italy	438,463	781,926	824,828	68.52	65.77	43.37	5.49
Turkey	0	118,835	611,689	0.00	10.00	32.16	414.74
Bosnia & Herzegovina	153,786	187,795	291,519	24.03	15.80	15.33	55.23
China	0	0	57,499	0.00	0.00	3.02	0.00
Slovenia	3,711	8,320	47,932	0.58	0.70	2.52	476.11
Germany	17,129	10,383	40,512	2.68	0.87	2.13	290.18
Austria	11,103	16,118	12,912	1.74	1.36	0.68	- 19.89
Montenegro	0	729	8,627	0.00	0.06	0.45	1083.40
Hungary	0	8,860	3,878	0.00	0.75	0.20	- 56.23
Netherlands	2,152	1,902	2,349	0.34	0.16	0.12	23.50
Bulgaria	0	12,877	0	0.00	1.08	0.00	- 100.00
Serbia and Montenegro	891	0	0	0.14	0.00	0.00	0.00
Slovakia	6,136	0	0	0.96	0.00	0.00	0.00
Serbia	0	3,287	0	0.00	0.28	0.00	- 100.00
United States	6,274	29,872	0	0.98	2.51	0.00	- 100.00
Romania	0	7,712	0	0.00	0.65	0.00	- 100.00
Switzerland	277	195	0	0.04	0.02	0.00	- 100.00

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Croatia Export Statistics To World

Commodity: Tree Nuts, Group 20 (2007)

Year To Date: January - December

Commodity	Description	United States Dollars
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		2006	2007	2008
Tree Nuts	Group 20 (2007)	639,922	1,188,811	1,901,745
080222	Hazelnuts Or Filberts, Fresh Or Dried, Shelled	83,261	235,684	855,826
080221	Hazelnuts Or Filberts, Fresh Or Dried, In Shell	438,616	707,062	643,015
080232	Walnuts, Fresh Or Dried, Shelled	48,868	81,538	182,187
080240	Chestnuts, Frsh Or Dried, W/Nt Shelled Or Peeled	0	0	153,579
080212	Almonds, Fresh Or Dried, Shelled	54,704	157,808	51,696
080122	Brazil Nuts, Fresh Or Dried, Shelled	0	440	7,787
080111	Coconuts, Dessicated	616	195	4,652
080250	Pistachios, Fresh Or Dried, Shelled Or Not	7,721	3,898	1,433
080231	Walnuts, Fresh Or Dried, In Shell	0	1,521	1,270
080132	Cashew Nuts, Fresh Or Dried, Shelled	6,136	665	300

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Croatia: Imports and Exports of Almonds

Croatia Import Statistics

UDG: Almonds,

Year To Date: January - December

Partner Country	United States Dollars			% Share			% Change 2008/2007
	2006	2007	2008	2006	2007	2008	
World	2,979,305	4,133,184	4,830,211	100.00	100.00	100.00	16.86
United States	2,515,179	3,615,851	4,239,443	84.42	87.48	87.77	17.25
Italy	264,068	326,964	243,854	8.86	7.91	5.05	- 25.42
Chile	116,617	450	111,499	3.91	0.01	2.31	∞
Australia	20,496	0	98,570	0.69	0.00	2.04	0.00
Spain	27,961	34,765	73,970	0.94	0.84	1.53	112.77
Netherlands	719	1,302	15,880	0.02	0.03	0.33	1119.66
Greece	0	22,090	15,611	0.00	0.53	0.32	- 29.33
Hungary	19,724	56,719	14,293	0.66	1.37	0.30	- 74.80
Slovenia	0	141	10,276	0.00	0.00	0.21	7187.94
Slovakia	6,383	0	2,601	0.21	0.00	0.05	0.00
Turkey	4,541	3,975	1,038	0.15	0.10	0.02	- 73.89
France	0	1,730	982	0.00	0.04	0.02	- 43.24
Belgium	0	0	857	0.00	0.00	0.02	0.00
United Kingdom	750	310	810	0.03	0.01	0.02	161.29
China	126	0	269	0.00	0.00	0.01	0.00
Israel	0	0	258	0.00	0.00	0.01	0.00
Iran	0	12,720	0	0.00	0.31	0.00	- 100.00
Germany	1,887	1,101	0	0.06	0.03	0.00	- 100.00
Canada	0	55,066	0	0.00	1.33	0.00	- 100.00

Austria	854	0	0	0.03	0.00	0.00	0.00
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Croatia Export Statistics

UDG: Almonds,

Year To Date: January - December

Partner Country	United States Dollars			% Share			% Change 2008/2007
	2006	2007	2008	2006	2007	2008	
World	54,704	157,808	51,696	100.00	100.00	100.00	- 67.24
Bosnia & Herzegovina	22,453	19,162	19,347	41.04	12.14	37.42	0.97
Germany	13,747	7,305	14,652	25.13	4.63	28.34	100.57
Austria	10,308	13,672	11,745	18.84	8.66	22.72	- 14.09
Hungary	0	8,860	3,878	0.00	5.61	7.50	- 56.23
Slovenia	2,224	5,068	1,108	4.07	3.21	2.14	- 78.14
Netherlands	279	526	494	0.51	0.33	0.96	- 6.08
Montenegro	0	0	472	0.00	0.00	0.91	0.00
United States	5,693	29,872	0	10.41	18.93	0.00	- 100.00
Italy	0	73,343	0	0.00	46.48	0.00	- 100.00

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Import Procedures for Tree Nuts

Incoming goods must go through customs storage at transport terminals or airports. After the goods arrive at the customs storage, the importer or freight forwarder should start procedures for checking and clearing goods, which includes special documents that should be sent to the Inspection Departments and the Customs Office. The procedure starts at the Sanitary Inspection, which checks the goods. From time to time samples are taken for food safety testing. If products are of suspicious quality and health standards their sales will be banned until an analysis is conducted. Customs clearance and removal from storage is carried out under the supervision of a customs officer who compares the documents with the commodities after they were checked by sanitary inspector. For the import procedure it is of outmost importance for the exporter to have a reliable freight forwarder and/or a friendly and trustworthy trade partner.

Requirements for Import

Generally, if a shipment can pass EU border inspection, it can pass Croatian border inspection. More specifically the standards for tree nuts are as follows:

Microbiological Criteria

Microbiological criteria are set by the Regulation on Microbiological Criteria for Food (NN74/2008, NN156/2008) and Guide for Microbiological Criteria for Food. Microbiological criteria are only recommendations and are not legally binding. In addition they are a responsibility of an importer. In practice, this means that Croatian Institute for Public Health through their testing laboratories can only give advice on recommended levels of microorganisms.

However, if the product is found to be harmful for human health, then according to the Food Act the importer/company that is responsible for putting that product on the market assumes the legal responsibility for marketing food that could be detrimental to human health. Thus, importers follow the recommended levels for microorganisms and exporters are advised to send products that fit the following criteria as defined by the Guide for Microbiological Criteria for Food:

Food	Recommended parameters	Sampling plan		Criteria
		n	c	
Dried fruits and caddied fruits, fruits and seeds (figs, almonds, poppy, etc.), dried vegetables and dried mushrooms	Aerobic mezophilic bacteria	5	2	$m = 10^4 \text{cfu/g}$ $M = 10^5 \text{cfu/g}$
	Salmonella spp.	5	0	$M = 0 \text{cfu/g}$
	Enterobacteriaceae	5	2	$m = 10^2 \text{cfu/g}$ $M = 10^3 \text{cfu/g}$
	Sulfite-reductive clostridium	5	2	$m = 10 \text{cfu/g}$ $M = 10^2 \text{cfu/g}$
	Yeast and mold	5	2	$m = 10^2 \text{cfu/g}$ $M = 10^3 \text{cfu/g}$

n = number of sample units that create a sample

c = number of sample units in which number of bacteria can be between "m" and "M" and the sample is still considered acceptable but only if number of bacteria in other sample units is "m" or less

m = threshold below which all the results are considered acceptable

M = permitted threshold above which results are not considered acceptable.

If only one result is above that value then the sample is not considered acceptable.

cfu = colony forming units

Maximal Residue Levels (MRLs) for Pesticides:

The maximum content of certain pesticide or pesticide residues in foodstuffs is governed by The

Regulation on Maximum Level of Pesticide Residue in and on Food and Feed of Animal and Plant Origin (NN148/2008, NN 49/2009). Croatian MRLs list is equal to the EU MRLs list (Amendment to Annexes II, III, IV to Regulation (EC) No 396/2005). Listed levels are legally binding.

Micotoxin Levels:

Micotoxins in food are regulated by The Regulation on Maximum Permitted Amounts of Specific Contaminants in Food (NN154/2008). Listed levels are legally binding.

Croatian maximal level for total aflatoxin in nuts or products from nuts intended for direct human consumption or as food ingredient is 4 µg/kg and for aflatoxin B1 is 2 µg/kg. In the case that shipment of nuts has higher then permitted aflatoxin levels then that shipment can be used for something other then human consumption. In addition nuts in that shipment can be sorted or physically treated in the manner that does not cause production of harmful residues. To be allowed on the market after the physical treatment nuts should not exceed 4 µg/kg of total aflatoxin and 2 µg/kg of aflatoxin B1.

Tariffs 2009

The latest applied custom rates are on the following web page: <http://www.carina.hr>

Key Contacts and Additional Information

A list of Croatian almond and dried fruits importers is available to U.S. exporters and can be obtained by contacting:

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